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ABSTRACT

This conference paper presents a description of how faculty workloads are assessed for fiscal and other purposes at Northern Arizona University (NAU). Following a discussion of workload issues, the paper examines: (1) definition of workload; (2) methodology for data collection; (3) development of a faculty full-time equivalency database and two linking databases on faculty demographics and course offerings; (4) usefulness of the workload data for assessing instructional productivity, instructional activity, noninstructional activity, and other areas in which the data can be used; (5) challenges and pitfalls; and (6) alternative methods such as self-reported surveys, time-based analysis and expectation/accomplishment documents. A conclusion lists elements that are important to consider in developing a system similar to the NAU system. (JB)

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FACULTY WORKLOAD:

Implementing a Strategy for Assessing Faculty Utilization

A Paper Presented
at the
Association for Institutional Research
32nd Annual Forum
Atlanta, GA May 10-13, 1992

by

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HE 025 770

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This paper was presented at the Thirty-Second Annual Forum of the Association for Institutional Research held at the Atlanta Hilton & Towers, Atlanta, Georgia, May 10-13, 1992. This paper was reviewed by the AIR Forum Publications Committee and was judged to be of high quality and of interest to others concerned with the research of higher education. It has therefore been selected to be included in the ERIC Collection of Forum Papers.

Jean Endo
Chair and Editor
Forum Publications
Editorial Advisory Committee

FACULTY WORKLOAD at NORTHERN ARIZONA UNIVERSITY

BACKGROUND

The idea of collecting and analyzing data on the workload of faculty is not one new to the academic realm. As early as 1919, Leonard V. Koos published a major study of faculty workload in which he examined the various influences on teaching loads [1]. Since that time numerous articles have been written which detail efforts to describe, categorize and analyze workload.

The question most often posed to me about faculty workload is why do it? Or, further, what is the benefit in collecting such extensive data cyclically.

Let me try to relate this process to what I feel should be a major role of an institutional research office. In a nutshell, the Institutional Research office is the primary source of data at Northern Arizona University (NAU). If there is a question regarding enrollment demographics, employees, faculty, etc., we are the people to contact. It is important, however, that we go beyond the role of a data clearinghouse by defining the nature of the data, anticipating future data requirements, and providing the data before the administration realizes they need it.

Because data requests change, and the manner in which the data are viewed changes, it is important to have a flexible system in place that can accommodate these new and differing requests in a timely fashion. And we must not become complacent in the systems we design. Envisioning what may be needed next, and keeping one step ahead of the requestor, can really pay dividends in the future. I have certainly found this to be true.

Specifically regarding data on faculty:

Like most other institutions of higher education, the budget crunch is hitting us hard; employees at NAU did not get raises this year, enrollment grew by nearly three percent, but funds are not available to increase the number of faculty or related operations dollars. Administrators are scrambling to make do with what they have, and legislators are apparently looking beyond formula funding to how the dollars they allocate are used. In particular, one of the hot topics is fast becoming faculty workload. How are we utilizing the faculty resources that we <u>do</u> have.

We, as researchers, can see the double edged sword at work in universities because we essentially are objective bystanders. In order to attract and keep what are considered to be quality, reputable faculty, universities must allow them an element of freedom to conduct independent research and enhance themselves professionally. We want to facilitate an academic environment of scholarship which requires work other than teaching, but by the same token these are the very faculty we want in the classroom conveying their knowledge. This philosophical dilemma is compounded further by the budget situation and the concept of accountability.

Too often the public notion is that all faculty do is teach. If they are not in the classroom or over-seeing independent study students, then there must

be a problem. I am aware of a number of institutions that have a process in place to look at the teaching loads; classes and in some cases, independent study. Yet, the work that faculty are requested and required to do goes beyond direct teaching and is often overlooked. Faculty workload is an attempt to quantify and summarize the many other activities in which faculty are involved; they conduct research, act as student advisors, serve on departmental and university level committees, develop curriculum, administer programs, and contribute to public service.

If trimming the fat and tightening the belt are the future at NAU, faculty workload is an invaluable tool for providing a quantitative means of determining the impact of release time, the trends in assigning release time and where we might cut back on release time. On the other hand, we can provide the numeric means of justifying less than "full" teaching loads by showing what the faculty are doing. Beyond that we can show numerically why faculty are becoming so disgruntled about their workloads and workload distributions.

This paper will describe what one university is doing to examine this issue.

[1] Koos, L.V. *The Adjustment of the Teaching Load in a University.* Department of the Interior, Bureau of Education, Bulletin No. 15, Washington, D.C.: Government Printing Office, 1919.

FACULTY WORKLOAD OVERVIEW

When I refer to faculty workload distribution, I am referring to the distribution of an instructors time/effort measured in full time equivalency across the activity categories listed below.

Direct Instruction (related to course numbers)
- Classroom - lectures and lab section with enrollment > 2
- Individualized - independent study, practicum, thesis, dissertation, student teaching, sections excluded under classroom

Indirect Instruction
- Instruction Related Activity - advising, curriculum development, course coordination, departmental/college service
- Departmental Research

Non-Instruction Activity
- Administration
- Public Service
- University Service
- Organized and Sponsored Research

NAU has collected faculty workload data since the early seventies. Suffice it to say, there have been numerous changes in the semesters since the process was first implemented.

In the infancy of workload data collection, chairs were asked to report faculty load using credit hours only. This proved to be a problematic measure. In many cases, the level of faculty effort is not reflected by the assignment of credit hours, particularly when dealing with labs or independent study sections. As a consequence full time loads of individual faculty could range from anywhere from 1 to 20 plus credit hours. For this reason, the unit of measure chairs were asked to use was changed to proportion of FTE to facilitate a more consistent means of assessing full loads.

During this period (1975 to 1990), departments had been using a reporting standard of one full time faculty = one FTE = 12 course credit hours (or four 3 hour classes). In actuality, a full-time load is traditionally considered to be the equivalent of 15 credit hours, 12 credit hours of teaching plus a 3 credit hour equivalent of additional duties such as advising or departmental service. As a result, while we utilized a consistent measure, we were still only reporting on part of the picture.

Simplistically I look at our faculty workload efforts as addressing three areas:

1). What is the teaching load (including or excluding independent study)?
2). What is the distribution of faculty FTE as perceived/reported by department chairs or area heads?
3). What is the nature of the overall load and how is it changing?

Through the faculty workload as it currently exists at NAU, we can address the first two areas with some degree of accuracy and consistency.

We are able to examine teaching loads in a variety of ways; full-time faculty equivalents (FTE) devoted to classroom and related instruction; average number of sections, credit hours, and estimated contact hours per faculty FTE or faculty headcount. At the macro level, by looking at overall workload distribution, we can see a shifting of expectation from the classroom to other duties such as administration, research and service.

At the micro level, however, we still lack complete numerical data. What is the volume or degree to which faculty are involved in the numerous activities expected of them? Further, what is the hidden workload and what is the distribution of this hidden workload. Particularly, in the laps of what types of faculty does the burden of advising, governance and service fall?

The Office of University Planning and Analysis has spent considerable time and effort over the past two years examining the issue of workload at NAU. At the same time, increasing requests for a full accounting of faculty activity distribution, coupled with new faculty administrators bringing with them new methods of internal workload allocation (thus making university wide data uncomparable) brought the issue to the forefront. In order to reduce the burden on the department chairs, it seemed quite logical to us to modify procedures and collect more discrete data concurrent with the collection of teaching load data. To this end, several issue papers were developed for administrative review which laid out options for overall data criteria, collection and implementation and requesting guidance for direction. The resulting decision was the authorization to mandate a university standard. That standard effective Fall 1990 is that 1.00 FTE = 15 Credit hour equivalents. The differences in reporting are illustrated in Table 1.

TABLE 1 - Comparison of Reporting Standards

TRADITION

1 FULL TIME FACULTY LOAD = 12 Credit Hours of Coursework
+ 3 Credit Hours Equivalent Other Duties

		OLD SYSTEM	NEW SYSTEM
REPORTED	1 FTE Faculty =	12 Credit Hours	15 Credit Hours
	Two 3 CH Course	= .50 FTE	.40 FTE
	Release time Administration	= .25 FTE	.20 FTE
	Release Time Research	= .25 FTE	.20 FTE
	36 Advisees	= Not Reported	.10 FTE
	3 Independent Study Students	= " "	.06 FTE
	2 University Committees	= " "	.04 FTE

We found that collecting data on faculty distribution, while providing a good

basis for determining shifting expectations, was not adequate to describe the full measure of the loads faculty carried. Particularly in times of growing class size and additional burdens of governance, committees to assess growth, recruitment and retention efforts, curriculum examination and equity issues, it is important to have as clear a picture as possible of the true load expected of and performed by faculty.

Each department has internal formulas they use to allocate a faculty member's time to the activities listed, but they are not always consistent across disciplines or within colleges. It has also become increasingly apparent that the volume of activity has increased over the years.

As an example, I use the workload of Professor Joe Blow:

Two years ago he taught 3 courses (9 credit hours) and had release time from one class for research. Tradition dictates that this accounts for .80 FTE. The remaining 3 hours or .20 FTE is distributed across 2 independent study courses with 3 students (.06), committee service for 2 committees (.04), and advising of 36 students (.10).

This semester he is again teaching three courses, although one of the courses is a two credit hour course because he was asked to administer a new program for which he was released from a 1 credit hour lab. He still conducts research and still performs other activities.

But overall his load has increased:

Without any additional information from chairs, we know that his classes are bigger by an average of 2-3 students, and we know that the average number of individualized instruction students has increased by about 1/2 a student per FTE. It is also a good guess that he is being asked to serve on more committees. But it is only through the collecting of concrete data every year that we can verify that the volume of work has increased.

In order to facilitate the consistent reporting of this type of information, we ask for specific numbers; something we can use to show to whoever will listen that we are using the same FTE for perhaps three times the effort. This is an extremely important point to make to decision makers. If you sum the activities using any recognized standardized formula for FTE estimation, nearly all faculty go beyond the 1.00 FTE for which they are paid.

METHODOLOGY

I've laid down some groundwork as to why we conduct the faculty workload and given an overview of our definition of what workload encompasses. Now let me provide a brief synopsis of the methodology we employ. It is the manner in which these data are collected and maintained that defines its usefulness and sets the process apart from others.

The flowchart shown in *Figure 1*, depicts the steps we use in developing the faculty workload network each semester. The entire network consists of about 20 databases and many reporting and spreadsheet tools, that are not shown in

the flowchart. In this report I will discuss my master faculty FTE database which provides the foundation upon which most of the other instruments are built. I will also touch on the two major linking databases, FACULTY and PRFXTABL.

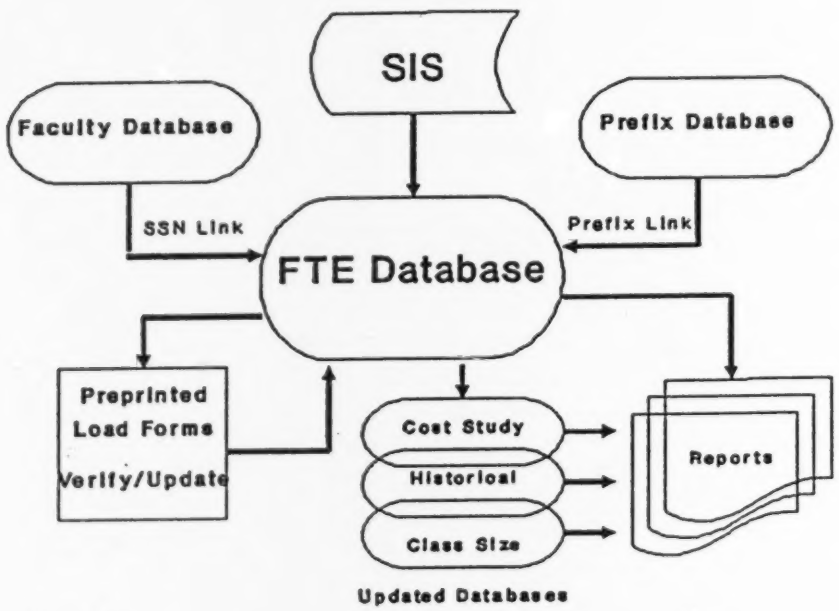

Figure 1-Faculty Workload Flowchart

Faculty FTE Database

The base data for the FTE component each semester comes from an ASCII file downloaded from the mainframe Student Information System course file. This gives me a listing of all valid courses as of the official census date with the corresponding instructor, estimated FTE based on a 15 CH system and the official enrollment and student credit hours. This flat-file information is loaded into the FTE database. Codes are then added to identify course type (classroom, lab, or individualized instruction) and multi-disciplinary courses are assigned to departments. Using this data a faculty load form is generated. (*Figure 2*)

The faculty load form lists each instructor, all courses scheduled for that instructor, and includes course and faculty demographics. The department head manually verifies on this form that each faculty member is in fact

teaching the course listed and provides additional information about the activity groups listed in the preceding section which are recognized as part of the instructors full time duties. The form as it would appear in completion is shown in *Figure 2*.

Name: BLOW, JOSEPH M SSN: 123456789 RANK: ASST STATUS: RF

Name Change/ Funding Acct	Course Section	Loc	HC	SCH	Hrs	Funding OL	Funding OV	Class-room	Indv Instr
	NAU 100 01	ON	33	99		✓		.20	
	NAU 331 01	ON	26	78		✓		.20	
	NAU 497 02	ON	5	12		✓			.07 .06

Describe Activity	Non-Course Activities	Dpt FTE	Oth FTE	Avg. Hr/Wk	Tot #	LD	UD	GD	Phd
	Advising	.10			36	.03	.07		
	Curric/Crse Dev								
Committees	Dept/Coll Srvc	.04			2				
Area Coord.	Administration	.20							
	Public Service								
	Univ Service								
	Dept Research	.20							
	Organized Rsch								
	Sponsored Rsch								

Figure 2 - Faculty Workload Form

In addition to sending out the workload forms, we also send a listing of all students who are taking independent study classes and ask the chairs to identify the faculty member actually responsible for supervising and grading that student. In the past we had relied on the chairs to reallocate the headcount and student credit hours from the instructor of record in the class schedule (usually the department chair) to individual faculty members. This particular element became especially important during a recent university system study because we were required to distribute teaching activity, including independent study, across faculty rank, and we want to make sure faculty at all ranks receive due "credit".

I receive the completed forms and make all indicated corrections for courses in the FTE database. I add the information on non-course activities and also add a record for any faculty who is not teaching. If I see anything out of line I will call the department to verify the information. Other fields in the database are used to estimate actual contact hours for instruction and to adjust section counts. Additional fields contain numeric information on activities such as number of advisees, committees, etc.

In conjunction with the FTE data two linking databases are utilized.

Faculty Demographics Database

The first is a FACULTY database. I create a new faculty database every fiscal year (usually using the previous year's data as a base). This database contains a record for each faculty member or academic administrator and for all part-time instructors or graduate assistants who teach a course. I maintain comprehensive data on faculty demographics, including rank, tenure status, ethnicity, gender, salary, contract type, home department, faculty status, highest degree, hire dates. I also maintain fields for previous salary, rank, tenure, contract type, and status. All faculty salary surveys are run from this data so I also add Y/N codes for inclusion in various surveys. This links allows me to run ad-hoc reports regarding workload for any of the demographic characteristics maintained. For instance, we recently did an analysis of the workload assigned to new faculty vs. continuing faculty. We receive numerous requests to compare workloads based on ethnicity, gender and most often, rank.

Prefix Table/Organizational Structure Database

The second database is called the PREFIX TABLE and is linked to the FTE Database on course PRFX and to the Faculty database on DEPT. This contains every course prefix offered by NAU with the corresponding department, college and IPEDS code under current organization. This is a dynamic database in that I update the database any time there is an organizational change, including consolidation or separation of departments, reorganization/ elimination of colleges, etc. Since several major reorganizations have taken place at NAU within the past 5 years, most of my databases contain fields for both original department and college which are input fields and current department and college which are pulled from PRFXTABL. This enables me to do historical reporting using either current or former organizational structure.

BENEFITS and UTILIZATION OF WORKLOAD DATA

As you may have guessed, the entire process is relatively time consuming and tedious, but the end result is a database system that has been more than invaluable for meeting administrative needs. My guess is that I use this data or some derivative of it to fill about 85 % of the project type requests I receive.

One example of the usefulness of the data is the report series distributed to administrators and deans each semester.

Instructional Productivity- Shows the faculty FTE, student FTE, faculty FTE to student FTE ratio, and Faculty FTE to student credit hour ratio. This is done for each course level, department being the lowest level of reporting, although it can be modified to show location, prefix, faculty type, etc.

Instructional Activity- Shows the FTE and percent of FTE devoted to classroom activity, individualized instruction and other instruction related activities. Again by level and modifications, for ad-hoc.

Non-Instructional Activity- Shows the FTE and percent of FTE devoted to non-instructional activities such as funded research, administration, public or university services.

Faculty Type Report- Shows faculty FTE and headcount for instruction and non-instruction by faculty type.

Productivity Rankings - Shows student credit hour (SCH) to faculty FTE ratios ranked from high to low by department and compares changes from the previous semester.

In addition to generating those reports, I also keep a number of historical databases with data at the prefix level. These are built using ENABLE report programs that add new records of aggregate course data for each new semester. Some examples are average class size by location and course type, class size ranges, student credit hour summaries, and direct instruction salary costs that are ultimately used to generate reports for my annual cost analysis.

Some of the ad-hoc reports that have been utilized by executive management:

The Impact of Release time on classroom size

We talk about release time and the fact that it has increased over the last several years. What is the impact of this trend on class size? The increase in class size is a matter of some concern at NAU since one of our missions is to provide an environment of close faculty-student interaction, particularly at the undergraduate level. Using data from the faculty workload, it was determined that if the same proportion of release time found in 1987 were applied to total FTE in 1990, we would see - 15.5 more FTE in the classroom. Overall this equates to about 60 additional sections. Our office performed a fairly comprehensive analysis looking only at the distribution of FTE for departments that were showing increases in class size. Using the same methodology, administrators were shown that for those departments, a total of 85 sections were lost to changes in departmental release time since 1987, and therefore resulted in larger classes in these areas.

New versus continuing faculty teaching loads

Recently I responded to a question regarding the direct teaching loads of new faculty compared to continuing faculty. In 1990, we had seen a significant jump in release time. What we found was an element of what I suppose you could call reverse load compression, similar to salary compression. Not only are new faculty at some levels coming in at higher salaries, they are coming in with lighter teaching loads. This also would help explain the trends in class size increases and decreases in the percent of FTE being devoted to the classroom.

Average sections and contact hours per faculty by rank

The following are examples of data generated for the Joint Legislative Budget Committee (JLBC) last summer. The JLBC is a committee comprised of members of both the House of Representatives and the Senate who oversee budgetary matters in Arizona and make joint recommendations to the Governor. We were asked to show by level and rank the number of sections, contact hours, and faculty who taught or supervised independent study.

At NAU, for example, the average contact hours (excluding individualized instruction) taught by full time faculty was between 6.20 and 12.20 hours, depending on rank, which accounts overall for 50% of the total FTE. So what else are faculty doing? Now that legislators know that faculty do not spend all of their "time" on teaching, they will begin to look at what else we are paying faculty to do. In fact, a survey of faculty, coordinated by the JLBC, is now underway at the three state universities. Internally we have done considerable analysis on the distribution of faculty time and thankfully will already have a procedure in place to show the distribution of our faculty FTE. And to justify release or reallocate resources if necessary.

At NAU our faculty workload analysis indicates that faculty, in addition to direct teaching loads, have on the average, just over 3 students enrolled in individualized instruction, devote 18% of FTE to other instruction related activities, 13% to departmental research and the remaining 13% in other duties, including funded research and administration.

CHALLENGES and PITFALLS

While the I believe the benefits of this database far outweigh the problems, there are some problems and they should probably get some airing here too. First, loosely using the economics term Garbage in Garbage out, the data I provide is only as good as the data I receive. Departments complete the forms independently. It is up to each department to determine what will be expected of each instructor. It is also up to the department to distribute FTE across the categories based on what they feel are appropriate expectation levels. For instance, there are still no standard university formulas mandating n advisees equals x FTE.

Second is the fact that even though all departments are now using a standard base of 15 credit hours to report a full time individual, there will always be inherent differences between departments and disciplines which depend on the mode of instruction, mission of the program, etc. It is very easy to quantify faculty workload but not nearly as easy to qualify it. When we provide a final numerical report on productivity ratios (the student credit hours produced by 1 full-time faculty equivalent), it is very easy to compare unlike disciplines, such as lecture based English (which can accommodate many students in a lecture class taught by a single instructor) to Music (which is very much one to one based instruction).

The preferable usage would be to look at individual departments over time or to compare only departments in like disciplines, such as the sciences. Ideally, it would be beneficial to be able to use this data to compare ourselves nationally as we do with salaries, but as far as I know, there are no data available along those lines. At any rate, despite the value of this data, care must be taken regarding its usage and interpretation.

ALTERNATIVE METHODOLOGIES

Self Reported Faculty Load Surveys

One methodology that we have employed in the past and are in the process of conducting this spring is self reported faculty load. Generally, studies of faculty workload based on surveys ask faculty to indicate the average number of hours per week spent in broad activity areas, including teaching, preparation and evaluation, administration, research and service. In the case of the current effort in Arizona, the survey is intended to provide the Joint Legislative Budget Committee gross numbers only. At NAU we also have asked a sample of faculty to complete an extended survey which asks for more comprehensive data. For example, in addition to asking for the hours spent in advising, we are asking for the number of advisees, or the number of independent study students, etc. By doing so, we hope to determine an average number of hours expended in performing various activities.

We feel that this type of study can provide useful supplemental data; however, it should not be considered a replacement to the current method of workload data collection. Attempting to conduct this type of survey on an annual basis is unrealistic, in which case the ability to look at annual trends is lost. Additionally, unless full compliance is facilitated, the results are not adequate for the full range of analysis currently being performed.

Time Based Analysis

As mentioned in the previous section using this measure, that is, collecting data on actual contact hours or clock hours that faculty are engaged in various activities, can be problematic. While this information may be used for determining how release time might be more judiciously allocated, the faculty are not hired to work specifics hours. Rather they are hired and paid for a job, which includes teaching a certain number of classes, engaging in research and various other activities as agreed to each year.

Using time-based analysis as the sole measure of faculty effort may prove to be misleading. For example, it may take one faculty much less time to prepare and evaluate for courses, not because the task is less difficult, but because the faculty is just plain faster or employs a less strenuous mode of evaluation (eg. multiple choice rather than essay tests) or is utilizing previously prepared materials and lecture notes.
Related to this, two faculty members released from a single section to

conduct research may spend significantly different amounts of time in their respective endeavors. Nearly always the amount of time in release activities does not equate to the traditional time spent for courses from which they are released. The danger here is that this might be interpreted as the faculty spending a disproportionate amount of effort in non-instruction areas.

Expectation/Accomplishments Documents

We are currently examining the idea of reducing the burden of semester reporting effort devoted to workload by replacing a portion of the reporting with expectation or accomplishments documents. The benefits would be two fold.

First, the chairs would only be required to report course allocation on a semesterly basis, thus reducing the time required of them. Instead, FTE for non-course activities would be allocated based on year-end documents which detail all accomplishments during the academic year.

Second, this would force chairs to review faculty efforts across campus on an annual basis using a standard document. Apparently, the tendency has been in the past to overlook such annual review unless a faculty member becomes eligible for tenure or promotion. And once tenured, review is often non-existent.

WHERE TO GO FROM HERE

I'll close with a quick list of the elements I feel are most important to keep in mind if you are considering developing a system such as this:

1). Plan it carefully. Define internally what you hope to accomplish, talk to people at all levels prior to setting this up; the faculty, chairs and staff support who will be providing the data, administrators who will use the data. Get the approval/endorsement of the administration.

2). Look closely at the types of requests you receive for data and anticipate future needs. Set well-defined criteria for the information you want to collect. Believe me, it is an expletive deleted to constantly change a system, usually under a deadline, to provide data that you already could have already had.

3). Collect and maintain your data at the most discrete level possible. We started with one record per faculty per departmental budget. This worked until we were asked to provide data on faculty who were teaching off campus courses as part of their departmental load. We could not do it. We had to go back to the original workload forms for several years and extract those classes and associated FTE.

4). Determine what data might be applicable to link to a workload database in order to avoid unnecessary duplication of input, such as faculty demographics, classroom information, etc. and develop the system accordingly.

One of the tasks we hope to accomplish in the coming year to facilitate data comparability and understanding of our objectives, is to conduct "Faculty Workload Workshops". Although the turnover for chairs is not great each semester, the turnover of staff assistance which does much of the work is. We plan on conducting these workshops each fall.

CONCLUSION

In conclusion, let me repeat the question posed in the opening of this paper; why collect faculty workload data. I believe the answer is clear. Information is an essential element of decision making. We are operating amidst trying economic times. Those to whom we, as universities, are accountable want to know how we allocate the resources provided us. Some may make blanket assumptions from partial data regarding faculty effort that are erroneous and subsequently detrimental. Data is a powerful tool with which unjustified claims can be countered. University administrators, in turn, need valid data to make empirically sound decisions.

The question now remains-what *should* faculty be doing? What is the optimum input of human resources to achieve the academic mission of the university? Before one can decide that or even address the issue, one must or should know the current mix. As data analysts we can not make the final decisions as to what the ideal mix of activities should be, but we can certainly provide the means necessary to make those decisions informed ones.

ADDITIONAL DOCUMENTS AVAILABLE

Copies of the instructions we give to the chairs *(Appendix A)* and copies of the database definitions *(Appendix B-D)* are not included in this document. These documents, as well as the instruction manual I use, report programs and examples of reports are available for any one who is interested. And I am, of course, very interested in answering any questions or hearing any comments/suggestions from those who are currently working with faculty workload data.